
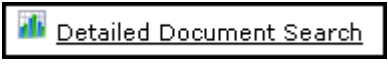






ACES 2013 – Managers with Overall Progress Review Ratings & Phase of Form

I. Running the Report

Log into ACES

- 1) Log into ACES and click on **Reports**  tab
- 2) Click on **Classic Reporting** 
- 3) Click on **Detailed Document Search** 
- 4) Click in radio button **Detailed Search:**  *'Detailed Search' is used to find documents*
- 5) Select your **Department, Division, and All Locations** (see sample below)
- 6) Under **Document Name:** select **Other** and **2013 ACES Form**
- 7) Under **Export File Format** select SuccessFactors' v4e: 
- 8) Click on **Open Export Options** 
- 9) Click in radio button **overall progress ratings**.



Note:

Overall progress ratings report is a shared report in which all ACES coordinators have access. By clicking on the overall progress ratings button, it is automatically selecting the fields needed to run this report.

- 10) At the bottom of the page, click on **Export Doc Contents (Compact)**

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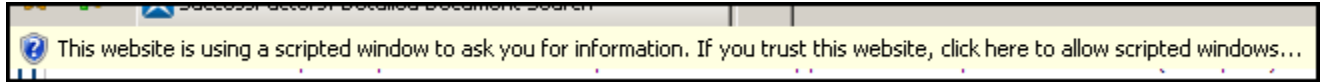
Misc Info Fields: ☐ Select All

| | | |
|---|---|--|
| <input checked="" type="checkbox"/> Owner Full Name With Username | <input type="checkbox"/> Owner Full Name | <input type="checkbox"/> Owner Id |
| <input type="checkbox"/> Form creator Full Name With Username | <input type="checkbox"/> Form creator Full Name | <input type="checkbox"/> Form creator |
| <input type="checkbox"/> Current Step Number | <input checked="" type="checkbox"/> Current Step Name | <input type="checkbox"/> Total Routing |

☐ Include In Progress 360 ~~in Document Content Export~~

Generate Report Export Report **Export Doc Contents(Compact)** Export Doc Contents

The following message may appear at the top of your screen:



Note: Put mouse over the highlighted text and use mouse to right click on the message and select **"Temporary Allow Scripted Windows"**.

Click again on **Export Doc Contents(Compact)**

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11) A window will appear, prompting you to name the report. **Enter file name** and click **OK**.

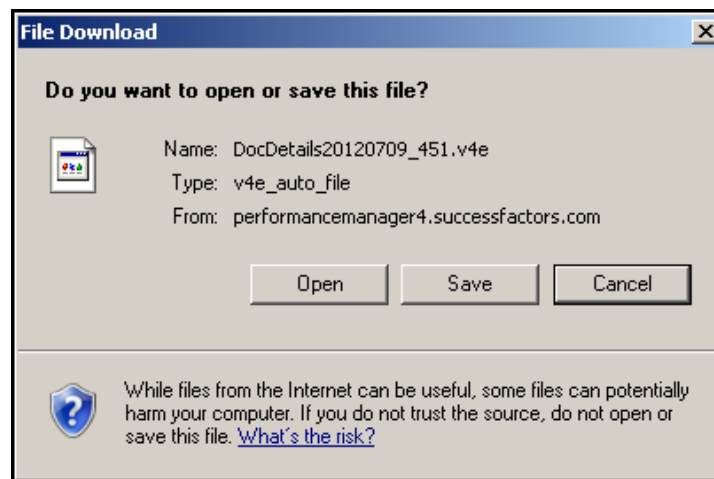
12) The following message will appear indicating that the report has been scheduled to run:

Your report has been scheduled. An email will be sent to you when the report is ready for download. You can check the status and retrieve results in [Scheduled Reports](#).

13) You will receive an **email notification** once your report is ready to be downloaded. Note: it can take up to ½ hour, depending on the size of the report.

II. Accessing the Report

- 1) Click on  **Reports** and **Scheduled Reports** 
- 2) Click in the **check box** to the left of the report name.
- 3) In second Download column, click on **2 files**.
- 4) Another box will appear in **Download** column. Click on **DocDetailsxxxxxxxxx** file (see sample below).
- 5) Select **Open**.



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6) Excel file will open. Data will appear on page like sample below.

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N |
|---|-------------|-------------------|------------------------------|---------------------------|------------------------------|-------------------|-----|------|------------|-----|--------------------------------------|---|---|---|
| 1 | Document Id | Current Step Name | Process Owner/Currently With | Reporting Manager User Id | Reporting Manager First Name | Reporting Manager | | | | | | | | |
| 2 | 32445 | Planning | John Smith (258220) | 231542 | Mary | Williams | DCP | EOAF | Competency | 169 | Communication / Interpersonal Skills | | | |
| 3 | 32445 | Planning | John Smith (258220) | 231542 | Mary | Williams | DCP | EOAF | Competency | 170 | Decision-Making Skills | | | |
| 4 | 32445 | Planning | John Smith (258220) | 231542 | Mary | Williams | DCP | EOAF | Competency | 171 | Supervisory Skills | | | |
| 5 | 32445 | Planning | John Smith (258220) | 231542 | Mary | Williams | DCP | EOAF | Competency | 173 | Progress Review Overall Rating | | | |
| 6 | 32445 | Planning | John Smith (258220) | 231542 | Mary | Williams | DCP | EOAF | Competency | 172 | Final Comments | | | |

7) Highlight Column A (see below). From the **Excel toolbar**, select **Data**, and **Text to Columns**.

| | A | B | Name | Department | Division | PF Type | PF Id | PF Name | PF Desc | Rating |
|---|-------------|-------------------|------------------------------|---------------------------|-------------------|----------|-------|---------|------------|--------|
| 1 | Document Id | Current Step Name | Process Owner/Currently With | Reporting Manager User Id | Reporting Manager | | | | | |
| 2 | 32445 | Planning | John Smith (258220) | 231542 | Mary | Williams | DCP | EOAF | Competency | 169 |
| 3 | 32445 | Planning | John Smith (258220) | 231542 | Mary | Williams | DCP | EOAF | Competency | 170 |
| 4 | 32445 | Planning | John Smith (258220) | 231542 | Mary | Williams | DCP | EOAF | Competency | 171 |
| 5 | 32445 | Planning | John Smith (258220) | 231542 | Mary | Williams | DCP | EOAF | Competency | 173 |
| 6 | 32445 | Planning | John Smith (258220) | 231542 | Mary | Williams | DCP | EOAF | Competency | 172 |

8) Convert Text to Columns Wizard Window will appear (sample below). Click on **Delimited** and **Next**



Convert Text to Columns Wizard - Step 1 of 3

The Text Wizard has determined that your data is Delimited.

If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

☒ Delimited - Characters such as commas or tabs separate each field.
 ☐ Fixed width - Fields are aligned in columns with spaces between each field.

Preview of selected data:

1

Document Id^Current Step Name^Process Owner/Currently With^

2

16690^Planning^John Smith (309903)^251849^Mary^William

3

16690^Planning^John Smith (309903)^251849^Mary^William

4

16690^Planning^John Smith (309903)^251849^Mary^William

5

16690^Planning^John Smith (309903)^251849^Mary^William

Cancel

< Back

Next >

Finish

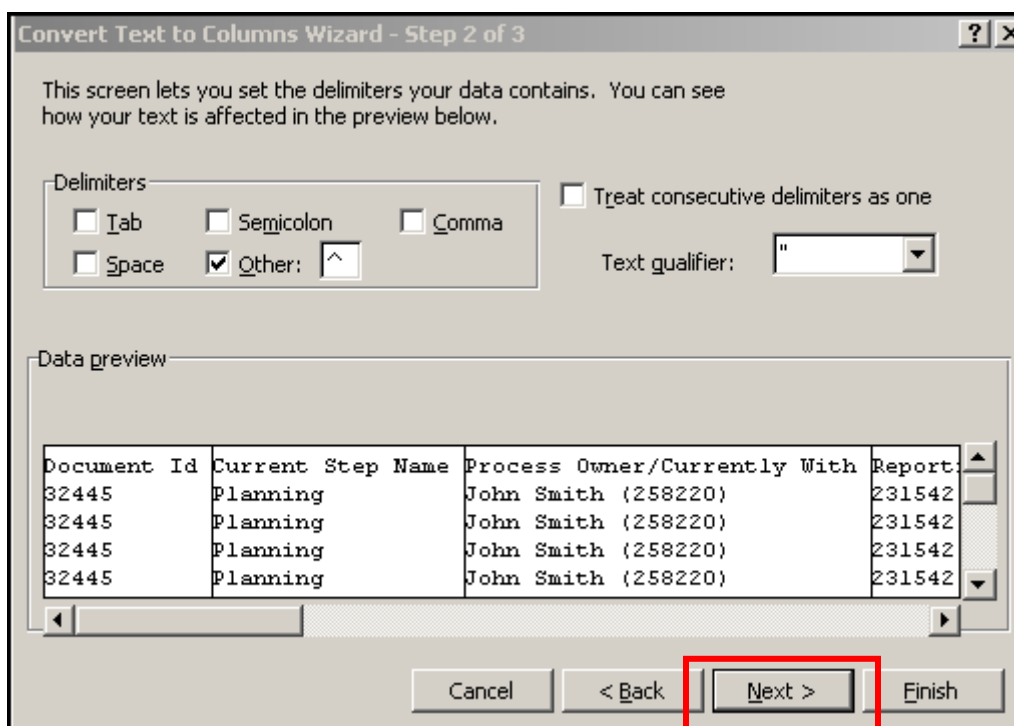
11/12

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9) Under **Delimiters**, select **Other** and enter carrot ^ (see sample below) and click on next

Next >



This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

☐ Tab ☐ Semicolon ☐ Comma
☐ Space ☒ Other: ^

☐ Treat consecutive delimiters as one

Text qualifier: "

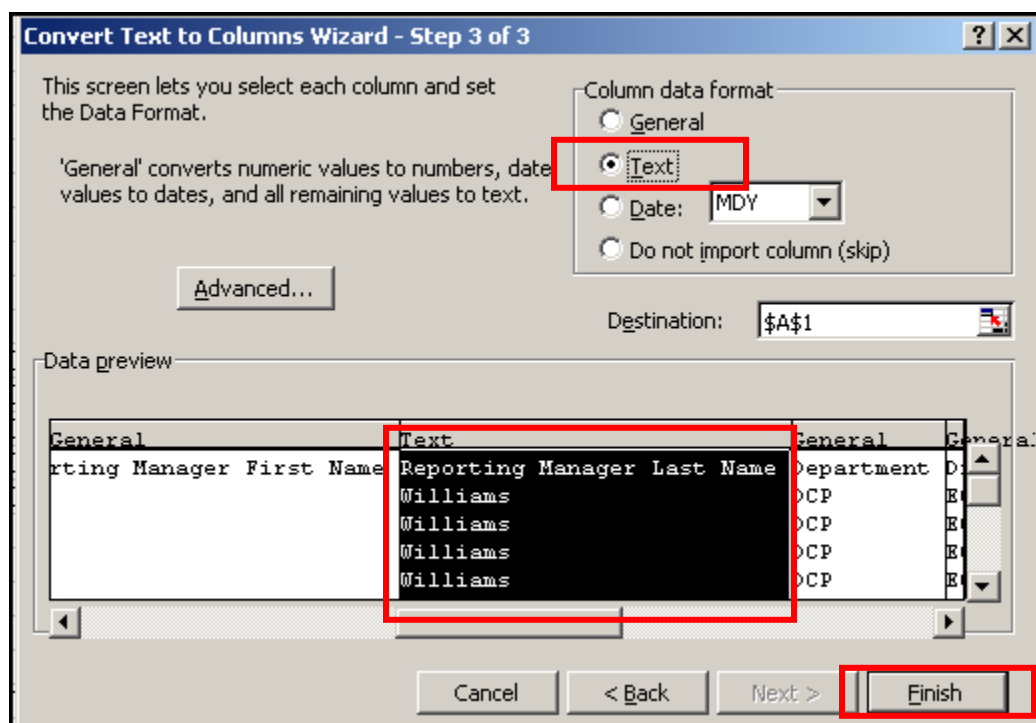
Data preview

| Document Id | Current Step Name | Process Owner/Currently With | Report: |
|-------------|-------------------|------------------------------|---------|
| 32445 | Planning | John Smith (258220) | 231542 |
| 32445 | Planning | John Smith (258220) | 231542 |
| 32445 | Planning | John Smith (258220) | 231542 |
| 32445 | Planning | John Smith (258220) | 231542 |

Buttons: Cancel, < Back, Next >, Finish

10) Under Data Preview, scroll to the right and highlight **Reporting Manager User ID** column, and under **Column Data Format**, select radio button **Text** (see sample below) and click finish

Finish



This screen lets you select each column and set the Data Format.

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

Column data format

☐ General
☒ Text
☐ Date: MDY
☐ Do not import column (skip)

Destination: \$A\$1

Data preview

| General | Text | General | General |
|------------------------------|-----------------------------|------------|---------|
| Reporting Manager First Name | Reporting Manager Last Name | Department | |
| Williams | Williams | DCP | |
| Williams | Williams | DCP | |
| Williams | Williams | DCP | |
| Williams | Williams | DCP | |

Buttons: Cancel, < Back, Next >, Finish

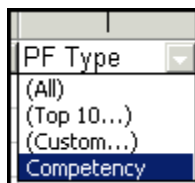
ACES 2013 – Managers with Overall Progress Review Ratings & Phase of Form

11) Once the file has been formatted, click in the upper left hand blank box to select all data in the Excel spreadsheet (data will be highlighted as in sample below).

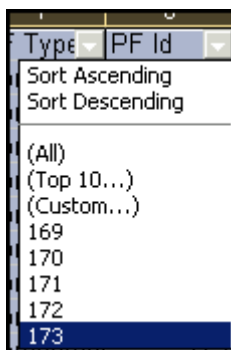
| | A | B | C | D | E | F | G |
|---|----------|------------|------------|-------------|-------------|-------------|-----------|
| 1 | Document | Current St | Process O | Reporting I | Reporting I | Reporting I | Departmer |
| 2 | 32445 | Planning | John Smith | 231542 | Mary | Williams | DCP |
| 3 | 32445 | Planning | John Smith | 231542 | Mary | Williams | DCP |
| 4 | 32445 | Planning | John Smith | 231542 | Mary | Williams | DCP |
| 5 | 32445 | Planning | John Smith | 231542 | Mary | Williams | DCP |
| 6 | 32445 | Planning | John Smith | 231542 | Mary | Williams | DCP |

12) Go to the **Excel Tool bar**, select **Data**, select **Filter**, and **Auto-filter**

13) At the top of the column heading **PF Type**, select **Competency**



14) At the top of column heading, **PF ID**, select **173**



15) Copy all rows to a new spreadsheet. The data can then be sorted as needed.

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N |
|---|----------|------------|------------|-------------|-------------|-------------|-----------|----------|----------|-------|-----------------|----------------|--------|------------|
| 1 | Document | Current St | Process O | Reporting I | Reporting I | Reporting I | Departmer | Division | PF Type | PF Id | PF Name | PF Desc | Rating | Rating Des |
| 2 | 32445 | Planning | John Smith | 231542 | Mary | Williams | DCP | EOAF | Competen | 173 | Progress Review | Overall Rating | | |